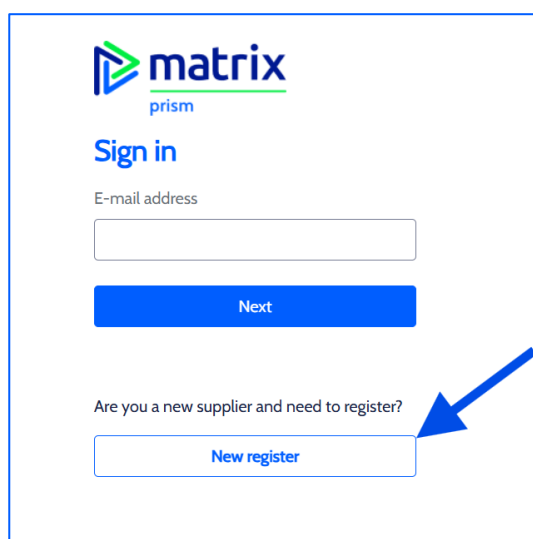


Supplier Application Guide – Matrix Prism

This guide has been created to help suppliers starting out on our Matrix Prism system and covers how to register your company, complete your company details & enrol to customers.

How do I register?

To begin your application please go to <https://www.matrixprism.com/MatrixConnex/> and click on “New Register”:



The screenshot shows the Matrix Prism login and registration interface. At the top is the 'matrix prism' logo. Below it is a 'Sign in' link. There is an input field for 'E-mail address' followed by a blue 'Next' button. Below that is a question 'Are you a new supplier and need to register?' with a 'New register' button. A blue arrow points to the 'New register' button.

What Information will I need?

You will need the following to complete the application:

- Companies House Number
- VAT Number
- Evidence of Insurance

For your insurance, you will need to provide a document which confirms you as the insured party, the period of cover, limits of indemnity and that the limit is on a per claims basis.

Step One of the Application

The Company Details on the application will be generated automatically based on the details from Companies House. You will then be asked to input your VAT number and be given the option to update your company logo.

Next fill in your insurance amounts and set the key contacts for your business. You will be given the option to create contacts for the account manager, contract queries, finance & compliance.

Once these have been completed you can select job categories and regions to determine the clients which best fit. Additional categories can be selected at the enrolment stage but this will allow you to see the clients which best align with the categories and regions you wish to support.

To do this tick the category, this will then take you to a second menu where you can select the locations and sectors you can supply as per the below example:

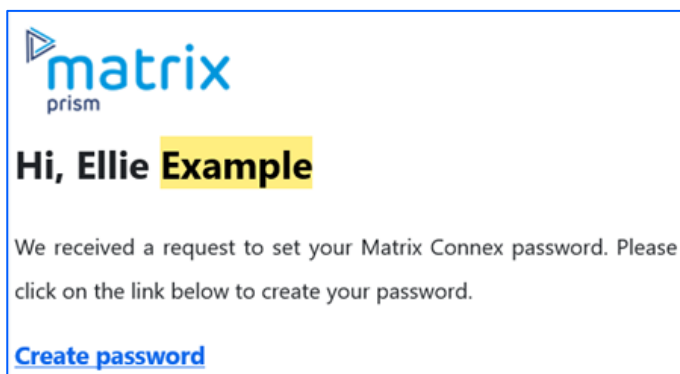
The screenshot displays the 'Choose the job categories specialities! These can be up' section of the Matrix Prism application. On the left, a card for 'Admin & Clerical' is shown with a checkbox, '0 customers', '648 live roles', and '£578K av. spend p/m'. On the right, the 'Admin & Clerical' section is active, showing location selection options: 'All UK', 'England', 'Wales', and 'Scotland', all of which are checked. Below this is a 'Select location by map' button. The 'Sectors' section follows, with the text 'Further refine customers you are matched with by telling us which s'. Under 'Which sector can you supply?', four options are listed: 'All sectors', 'Education', 'Blue Light', and 'Construction', all of which are checked.

Repeat this step for all categories you wish to view matching clients for.

You can then proceed to the next page where you will need to complete your declarations.

Once these are completed you will be given the opportunity to review the information provided so far and submit the initial company details.

The contacts that you have set up during this application process will then receive an email asking them to set their password and login to the system:



Step Two of the Application

Once you have set your password and logged into Prism you will be directed back to the application so that you can complete the process. As you go through this application there will be a checklist to advise which sections are outstanding:


2 Sections require attention

- ✓ Agency details
- ✓ Declarations
- ✓ Enrol with customers
- ✗ Insurance & agreements
- ✗ Agency agreement

Enrolling with Customers:

Under the Enrol with Customer section you will see a customer list which should display as per the below screenshot. Within this screen you can see their insurance requirements, search for specific clients & sectors:

Customers

From what you have told us, you will find a list of customers below tailored around your areas of expertise. If you are looking for a specific customer name, you can search for them using the search field below.

All sectors

All statuses

Customer	Sector	Live roles	Spend P/A	Liabilities & Insurances	T&C's	Enrolment status
Preston City Council - CO 4 matching job categories	Local Government	150	£12.0M	✓ Employers liability: £10M ✓ Public liability: £10M ✓ PI Insurance: £5M		Enrol

Where you do not meet the insurance requirements for a client these will display with an orange triangle, and you will not be able to enrol unless you amend your insurance amounts & provide evidence of the cover amounts:

Training Customer 4 matching job categories	Health & Social Care	65	£5.0M	⚠ Employers liability: £70M ⚠ Public liability: £70M ⚠ PI Insurance: £70M
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NB. We would advise that for the majority of our customers the following insurance covers will be required:

- Employer's Liability - £10million
- Public Liability - £10million
- Professional Indemnity - £5million

To enrol to a customer click on "Enrol". The categories chosen in step one will be pre-ticked but you will also have the option to select additional categories if needed:

*** Categories**

Short description about categories to be supplied by the Customer.

☐ All categories	☒ Interims	☒ Management	☒ Planning
☒ Procurement	☐ Admin & Clerical	☐ Catering & Hospitality	☐ Childrens Services
☐ Commercial	☐ Driving	☐ Education Non-Qualified	☐ Education Qualified
☐ Engineering & Surveying	☐ Facilities & Environment	☐ Financial	☐ Housing
☐ Human Resources	☐ IT	☐ Legal	☐ Manual Labour

Once all have been selected tick “Save”.

You will then need to click on the icon in the T&Cs column to view the addendum:

Customers

From what you have told us, you will find a list of customers below tailored around your areas of expertise. If you are looking for a specific customer name, you can search for them using the search field below.

Search customer All sectors All statuses

Customer	Sector	Live roles	Spend P/A	Liabilities & Insurances	T&C's	Enrolment status
Preston City Council - CO 4 matching job categories	Local Government	150	£12.0M	☒ Employers liability: £10M ☒ Public liability: £10M ☒ PI Insurance: £5M		Enrol

Once you have read through the terms, you will need to click “Accept” for the enrolment to be processed.

Once you have enrolled to all desired customers, you can then proceed to the Insurance & Agreements section.

Insurances & Agreements

On this screen you will need to complete your insurance value levels, renewal dates and provide proof of the cover. If your cover meets the requirements of the clients you have selected at enrolment stage the below message will appear:

Public liability insurance

* Insurance value level * Insurance renewal date

☒ Required cover is £70,000,000. The insurance value meets the required level

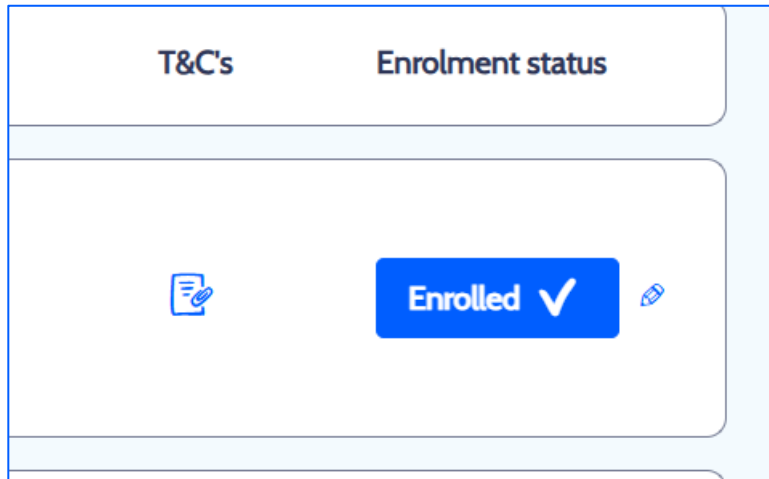
Upload proof of insurance

 Test Doc.docx 08 May 2024 

If your cover does not meet the requirements an error message will receive and you will either need to unenroll from the client or increase the cover.

If you need to un-enrol follow the below steps:

- Go back to enrolments
- Search for the client whose requirements are not met
- Click on the “Enrolled” button and select “Unenrol from customer”



If all requirements are met complete the details for all three covers and upload the supporting documents where prompted.

You will then be shown an overview of the agreements you have signed so far with any outstanding highlighted in orange:

Supporting documents		
Please note: you must view the terms & conditions before you can accept them.		
Customer name ↕	Terms & conditions	Status
Demonstration Customer	Read & accept 	
Go No Go Test	Read & accept 	
Legal Lense	Read & accept 	

For any with an orange status please click Read & Accept and ensured the terms are accepted so that roles can be received.

Following this you will then need to select your Matrix Partnership package.

Agency Agreements

Finally you will be taken to the agency agreements section to sign the self-bill and supplier agreements. These terms will be sent to you for review & signature via Precisely.

On the agency agreements page you will be shown the contact information for the Primary Contracts Contact set up in Step One:

Send for e-signature

Confirm which Company director is responsible for signing the agreements

Ellie Example
Example@Supplier.com 
+44 74548656555
Company Director

Send for e-signatureCancel e-signature

Click on Send for e-signature and this named director will then receive two links from Precisely (one for each agreement) advising them they have documents to sign. Please follow this link to read through the self-bill and supplier agreements before signing them electronically. Once the documents have been signed and all sections on the application checklist show as green you can then click on “Complete Registration” to submit this for review:

COMPLETE AGENCY APPLICATION

Application Checklist

Welcome back, Ben Builds

There are a few more actions to take to complete your application.

The whole application will take approximately:

 20 minutes to complete

Complete registration ✓

If you have signed the agency agreements, please refresh the page as these may take a few moments to register on the platform as a completed action, then click “Complete registration” above

This will then move the application into “pending review” status. A member of the supplier engagement team will review this within three working days.

Once your application has been approved you will then be able to access orders, submit candidates etc.